

Customer needs analysis

This template provides a list of questions to help profile a customer's needs and buying behaviors. You can use it to:

- Help qualify the lead and identify the route to the key decision-makers
- Inform your sales pitch to make it clear how your solution will benefit them
- Simplify the lead's journey to purchase (According to Gartner, 77% of buyers state that their last purchase was very complex or difficult)

The examples given below are based on the analysis of a sales rep pitching video conferencing software.

[NAME OF COMPANY: Fake Belief Accounting] Customer pain points	Analysis Complete?		How can our solution support them?
Key pain point #1	Y/N	<i>Struggling to gain market recognition</i>	<i>E.g. Accelerate brand awareness through more efficient touchpoints with clients</i>
Key pain point #2	Y/N	<i>Scalability</i>	<i>E.g. Allows management to confidently hand over processes to execs and focus on business growth</i>
Key pain point #3	Y/N	<i>High customer churn</i>	<i>E.g. Streamlines processes for higher client satisfaction</i>
Are they resulting in lost revenue/lost customers?	Y/N	<i>Yes (see report below)</i>	
How are they currently addressing them?	Y/N	<ul style="list-style-type: none"> - Manual processes - Archaic software - Ineffective integrations 	

- Outsourcing

Can they continue to operate without solving these issues?	Y/N	<i>Yes, but inefficiently and could be losing ground to competitors</i>
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Can you quantify the dollar amount (per year) lost by not solving these problems?	Y/N	<i>Yes - we have a report based on bespoke financial analysis, Forrester research &</i>
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Decision-makers - individuals	What are their current pain points? How are they currently addressing them?	How can our solution support them specifically?
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Department #1 - Sales	Y/N	
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Department #2 - Marketing	Y/N	
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Decision-makers - individuals	What are their current pain points? How are they currently addressing them? How can our solution support them specifically?
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Decision-maker #1: name & job title	Y/N	<i>Charlie Webb, Account Director</i>
What are their responsibilities?	Y/N	<i>Ensuring client retention, planning budgets for account management, performance evaluation & feedback</i>
What are their key motivators (how will the solution affect their goals/responsibilities)?	Y/N	<i>Struggling to gain market recognition</i>
How accessible are they? Who are the gatekeepers?	Y/N	<i>PA Martine Smithe, does not take sales calls; asks cold callers to email</i>

Who do they report to? Y/N CEO

Decision-maker #2:
name & job title Y/N

What are their responsibilities? Y/N

What are their key motivators (how will the solution affect their goals/responsibilities)? Y/N

How accessible are they? Who are the gatekeepers? Y/N

Who do they report to? Y/N

Decision-maker #3:
name & job title Y/N

What are their responsibilities? Y/N

What are their key motivators (how will the solution affect their goals/responsibilities)? Y/N

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How accessible are they? Who are the gatekeepers? Y/N

Who do they report to? Y/N

The customer's buying process

What is the customer's usual process for supplier selection:

- Solution research/ exploration Y/N

Word of mouth; recommendation

- RFI/RFP process Y/N

No official tendering process

- Approval/ validation cycle (specifically)? Y/N

CEO has a strong voice in selection and likes to get heavily involved in pitching process

- Characteristics of previous successful suppliers Y/N

Connections of CEO and/Corporate Secretary

- Other Y/N

What is the propensity to buy?

Y/N

Medium/High - contract period with current provider due for renewal in 3 months

What is the priority level? How immediate is the need?

Y/N

Medium - not currently a main priority

Budget

What is the budget available?

Who controls the budget?

What is the approval/sign-off process to access the budget?
